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WORKSHOP ON POPULATION AGEING IN EUROPE AND NORTH AMERICA: A MESSAGE TO THE WORLD SUMMIT FOR SOCIAL DEVELOPMENT
13-14 February 1995)

REPORT ON THE WORKSHOP

INTRODUCTION

1. The Workshop on Population Ageing in Europe and North America: A Message to the World Summit for Social Development was organized jointly by the ECE secretariat and the American Association of Retired Persons (AARP). The United Nations Fund for Population Activities (UNFPA) cosponsored the workshop and provided additional financial support. The Workshop took place at the Palais des Nations in Geneva, Switzerland.

2. The Workshop was attended by 81 participants, including government officials, independent experts, and representatives of United Nations bodies, intergovernmental organizations, and non-governmental organizations. The total number included 16 government officials, NGO representatives and experts from countries in transition (Belarus, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Poland, Republic of Moldova, Slovak Republic, Romania, Russian Federation, and Ukraine). In addition to the ECE secretariat, the following United Nations bodies were represented at the meeting: the United Nations Food and Agriculture Organization (FAO); the International Labour Organization (ILO); the International Institute on Ageing (INIA); the United Nations Fund for Population Activities (UNFPA), United Nations Office at Geneva (UNOG), the United Nations Programme on Ageing; and the World Health Organization (WHO). Representatives of the European Commission, of other intergovernmental bodies, and many NGOs from the ECE region also participated in the meeting.

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3. The Workshop was opened by Ms. Dunja Pastizzi-Ferencic, Deputy Executive Secretary of the ECE, and Mr. Robert P. Shreve, Chair of the Board of Directors of AARP. In her opening remarks, Ms. Pastizzi-Ferencic stressed the importance to the current and future well-being of the world's ageing population of the three interlinking themes of the forthcoming World Summit for Social Development, i.e. the elimination or reduction of poverty, the expansion of productive employment, and the promotion of social integration. As the ECE region was the first of the United Nations regions to have undergone a fundamental shift in population age structures, she considered it particularly appropriate for the ECE to send a message on population ageing to the World Summit on Social Development. The objective of the Workshop was the formulation of general policy recommendations to ensure that older persons remained a productive resource and were fully integrated in society, that they were able to experience a financially secure old age, and that they could remain active as members of the labour force, as members of their families and communities and as volunteers.

4. Mr. Shreve congratulated the ECE secretariat for having taken the initiative to organize the Workshop and stressed the importance of the three themes of the World Summit for AARP's constituency which numbered some 33 million persons over the age of 50. He expressed his satisfaction that representatives from a number of countries in central and eastern Europe were able to participate in the Workshop and in the formulation of policy recommendations to ensure the well-being of the elderly population in those countries.

5. Mr. Roushdi El Heneidi, Director of the UNFPA European Office, expressed UNFPA's support for activities in the area of population ageing and extended a warm welcome to participants. Finally, Ms. Raymonde Martineau, UN/NGO Liaison Officer at the United Nations Office at Geneva, and Ms. Irene Hoskins, AARP International Representative in Geneva, stressed the importance of increasing United Nations-NGO cooperation, of which the Workshop was a good example.

THE PROGRAMME OF THE WORKSHOP

6. The technical programme of the workshop provided an overview of the topics underlined below. Each of the technical topics was presented by a speaker and a discussant, followed by a general discussion among all participants.

7. Current demographic trends, future prospects and their implications for the ageing of populations in the ECE Region. The report examined, inter alia, subregional variations in population ageing, with particular reference to central and eastern Europe, and the growth in the number of the oldest-old, i.e. those 80 and over. Questions were raised as to how a disability-free life expectancy could be increased and how to monitor successful policies in the area of healthy ageing. (Reporter: Miroslav Macura, Chief, Population Activities Unit, ECE; Discussant: Shah Ibrahim, Head, Department of Public Health, Royal Free Hospital School of Medicine, United Kingdom).

8. Demographic trends from the perspective of the three principal themes of the World Summit for Social Development -poverty, employment and social integration. The report stressed the gender perspectives of population ageing in relation to the above-mentioned themes, such as the risk of widowhood, poverty, loss of spousal support, and living alone due to sex differentials in

mortality and morbidity rates. (Reporter: Jean-Pierre Gonnot, Population Expert, ECE; Discussant: Jacques du Guerney, Chief, Population Service, FAO).

9. Population ageing and the economic well-being of older persons with emphasis on the role of income security schemes in both the public and the private sector. The report raised the issue that the ageing of populations was often viewed as a crisis for the future financial stability of public-sector income security schemes. In many western industrialized countries, the origins of this lack of confidence in the future of such schemes might be found in philosophical and public policy shifts which favoured "private" solutions. The report discussed how confidence in the stability of these schemes could be restored and what measures were being taken to safeguard the income security of current and future generations of older people. (Reporter: Dalmer D. Hoskins, Secretary General, International Social Security Association; Discussant: Colin Gillian, Director, Social Security Department, ILO).

10. Living arrangements and the care of frail and dependent older persons: the role of the family, community and the State in caring for frail older persons. The report raised a number of questions regarding society's responses to population ageing and the organization of care for frail and dependent older persons. It highlighted the widening gulf in mortality and morbidity rates between the countries in central and eastern Europe and western countries and challenged policy-makers to design policies which would increase disability-free longevity. It was pointed out that the majority of the caregivers of frail and dependent older persons were women and that urgent measures needed to be taken by providing new models of community-based care and investing in family support strategies. The question was raised as to how to establish a proper balance which would result in coordinated care for older persons. This issue was particularly relevant in central and eastern Europe where new structures and organizations for the care of frail and dependent older persons were being created. (Reporter: Ilona Kickbush, Director, Health Promotion and Education, WHO; Discussant: Kai Leichsenring, European Centre for Social Welfare and Policy Research).

11. Participation of older persons in the economy and society: employment as a means of achieving social integration and independence. The report provided an overview of the situation facing older workers in the workplace today. On the negative side, there was widespread age discrimination, lack of training and retraining opportunities, negative stereotyping, high unemployment, lack of freedom of choice in retirement options, early withdrawal from the labour force due to disability, and working conditions which were not suited to the needs of older workers. On the positive side, laws were gradually changing to allow flexible, phased, and gradual retirement practices and some countries had enacted or were studying the possibility of introducing age discrimination legislation. Policies needed to be changed to allow for more flexible and family-friendly work arrangements with appropriate benefits throughout life, more freedom of choice with regard to retirement options, and education and training to eliminate negative stereotyping of older workers by employers and employees. (Reporter: Robert Anderson, European Foundation for the Improvement of Living and Working Conditions; Discussant: Gerd Naegele, Professor, Institute of Gerontology, University of Dortmund, Germany).

12. Integration of older persons in society: the options for success. The report reviewed the concept of integration in society and its various interpretations. Social exclusion could be prevented by recognizing the many

contributions older persons made to their societies. Two specific NGO models which promoted the integration of older persons in society were reviewed. As a non-partisan and non-governmental organization with a very large and diverse membership, AARP recognized and supported the contributions of all older persons. In particular, it provided older persons with opportunities to serve as highly-skilled volunteers in the community and as a political force on issues relevant to all generations and at all levels – local, national and international. As a newly created organization in the Czech Republic, Zivot 90 was an example of an NGO filling an identified need of a population in danger of being marginalized during the process of transition from a centrally planned to free-market economy. The programmes and actions developed by Zivot 90 were largely carried out by volunteers. (Reporter: Robert P. Shreve, Chair of the Board of Directors, AARP, United States; Discussant: Jan Lorman, President, Zivot 90, Czech Republic).

13. Throughout the two days of discussions, numerous references were made to the urgent need for better information and data collection on which to base well-informed and effective policy-making. The need for better data was especially crucial in designing policies for an ageing population in central and eastern European countries.

14. The interactive and informal character of the Workshop was distinguished by a lively discussion among all participants, complementing the information given by speakers. Numerous interventions were made by representatives of central and eastern European countries reflecting the specific situation in their respective countries, as well as by officials of international and non-governmental organizations and independent experts.

15. A panel discussion concluded the technical programme. Participants from government, international, intergovernmental, and non-governmental organizations explored the current and future roles of these organizations in the formulation of action programmes, research, and policies in favour of the ageing population. The panel was moderated by Elizabeth K. Mullen, Director, International Activities, AARP. Panel members were: Caroline Croft, Ageing Unit, European Commission; Miloslav Hettes, Director, Foreign Affairs Department, Ministry of Labour, Social Affairs and the Family, Slovakia; Alexander Kalache, Designate Chief, Health of the Elderly, WHO; Jacek Puts, Medical Centre of Postgraduate Education, Poland, and Richard Suzman, Chief, Demography and Population, National Institute on Aging, United States.

16. During the closing session, the meeting was addressed by Mr. Yves Berthelot, Executive Secretary of the ECE. Mr. Berthelot congratulated the participants on their work and reaffirmed the interest of the ECE secretariat in data collection and effective policies and programmes addressing the needs of an ageing population.

17. Throughout the two-day meeting, participants introduced policy recommendations relating to older persons with respect to each of the three themes of the World Summit for Social Development. During an extended closing session, presided over by Ms. Dunja Pastizzi-Ferencic, Deputy Executive Secretary of the ECE, the participants reviewed these policy recommendations and reached consensus with regard to their content. The complete text of the recommendations is contained in Annex I.

ANNEX I

TOWARDS A MATURE SOCIETY FOR ALL AGES:

A MESSAGE TO THE WORLD SUMMIT FOR SOCIAL DEVELOPMENT

Introduction

The populations of Europe and North America, with minor exceptions, have undergone their long-term transitions to low birth and death rates. These changes initiated and then sustained fundamental shifts in population age structures, resulting in population ageing. Fertility rates in many countries have descended below replacement level, ensuring sustained, and in some countries accelerated, population ageing into the next century. Mortality rates continue to decline in many countries, with gains in survival particularly notable among older people, the process which reinforces ageing. Life expectancies at birth in many countries, particularly in the West, have attained levels considered utopian only a few decades ago. By contrast, in a number of countries in central and eastern Europe, the so-called countries with economies in transition, there are disturbing signs of steady increases in mortality among certain population groups from relatively high levels, particularly among adult males.

Increased longevity is a success for humanity. As older persons make social and economic contributions, the ageing of population should be considered as an opportunity rather than a burden for society. Older persons are a heterogeneous group, the diversity resulting from differences in gender, socio-economic conditions, health status and cultural background. This heterogeneity requires clearly defined, multi-faceted and well-targeted policy responses. Policies and programmes should be guided by international instruments on ageing, including the International Plan of Action on Ageing, the United Nations Principles for Older Persons and the United Nations Targets on Ageing for the Year 2001. Ageing issues should also become a significant dimension of deliberations at the World Summit for Social Development, within the framework of its core issues - poverty, employment and social integration.

POVERTY

In spite of the considerable gains made in the ECE region to prevent individuals from falling below a living standard deemed by each society as the minimum subsistence level, poverty continues to affect certain vulnerable categories of the population. The persistence of poverty among older persons is particularly disturbing since older persons have most often worked for many years in the labour market, have cared for children and other dependent family members and have made valuable contributions to building society. Due to no fault of their own, they may find themselves in old age the victims of economic decline, the breakdown of social security and health systems, rampant inflation, and civil disorder or wars. Such developments have affected a number of countries with economies in transition over the last five years and, thereby, caused inter alia declines in living standards, social dislocation and increases in poverty, particularly among older persons.

Recommendations

(1) Governments and social security agencies should promote the understanding of the organization and mechanism of public pension programmes by the general public, in particular the ties that bind the generations together to finance national social security systems.

(2) Governments should establish or strengthen programmes to reduce the incidence of poverty among older persons and guarantee a minimum income to those older persons most at risk, such as women, the very old, persons with interrupted working lives and the frail elderly.

(3) Governments should ensure the future financial sustainability of pension systems that, among other things, ought to guarantee at least the minimum standard of living in order to eliminate the risk of poverty among older persons. This requires advance planning and periodic adjustments of pension systems.

(4) In the process of transition to a market economy, countries in central and eastern Europe should, where necessary, reform existing or create new social security systems, particularly pension schemes, before the expected rapid population ageing in the early next century takes place.

(5) Governments should ensure that social security, social assistance and other income maintenance programmes adequately provide for older women's financial security, taking into account unpaid work - particularly care provided for family members - and life-long earning inequalities based on gender.

(6) Governments should recognize that poverty, ill health and inadequate nutrition are closely related at any age and, therefore, should take measures to provide adequate health care, food support and nutrition education to the poor older persons.

EMPLOYMENT

In both the United States and the European Union, there has been a steady decline, over the last 20 years, in the paid employment of older workers. In the European Union, for instance, 75 per cent of those reaching retirement pension age are already retired or economically inactive. In central and eastern Europe, the transition from a centrally planned to a market economy is leaving many workers of pre-retirement and retirement age unemployed with limited or no opportunity to resume work, which exacerbates the depth and breadth of poverty among older workers.

Recommendations

(7) Governments and the private sector should promote legislative and public information measures aimed at advancing intergenerational understanding and preventing age discrimination in the labour market, such as ageist stereotyping by employers and employees.

(8) Governments should promote labour legislation, social security arrangements and working conditions that enable older persons to participate in the paid labour force.

(9) Governments should recognize that the underlying principle of choice applies equally to decisions about exit from employment, and should support flexibility in both the age and the processes of retirement.

(10) Government, along with the private sector, should encourage life-long education, training and retraining programmes, particularly for women, so they can enter, re-enter and advance within the paid labour force at any age.

(11) Governments should promote conditions, including opportunities for appropriate part-time work, conducive to combining work and caring responsibilities, as well as the equal sharing of such responsibilities between women and men.

(12) Governments are encouraged to promote the creation of employment and related regulations in the growing, diversified field of long-term care.

INTEGRATION IN SOCIETY

Ageing is a normal and ongoing process of the life cycle. The majority of older persons, both women and men, constitute an important resource and contribute to society in many different ways. Frailty and vulnerability affect people at all ages and should not be linked only to older persons, since the frail represent a relatively small proportion of older persons. Ill health, growing risk of poverty, decreasing participation in the labour force and in society are all forces that may cause growing marginalization of older persons. These forces appear more powerful in countries undergoing transition to a market economy than elsewhere in the region. In response to the risks of social exclusion of older persons, non-governmental organizations have designed or are designing programmes that promote sustained personal integrity and the social integration of older persons through decentralized, community-based programmes, voluntarism, education and information dissemination.

Recommendations

(13) Governments and all actors within the civil society are urged to recognize age and sex discrimination as a human rights issue and take appropriate measures to eliminate such discrimination.

(14) Governments, the private sector, the media and non-governmental organizations are encouraged to promote positive and realistic images of older persons that reflect the full scope of their contributions to and roles in society and the family.

(15) Governments and non-governmental organizations should support and promote new roles and opportunities for older persons, including service to the community either remunerated or unremunerated. Where needed, the obstacles to volunteering should be removed.

(16) Non-governmental organizations should be supported in order to strengthen their capacity, e.g. through networking, for advocacy, services, and information gathering and dissemination relating to the well-being of older persons.

(17) Governments and the international community should facilitate and encourage the development of the non-governmental sector, which promotes the well-being of older persons, particularly in countries with economies in transition.

(18) Governments, public authorities and non-governmental organizations at all levels should enable older persons to participate in all decision-making, including the development and implementation of health and care systems, both formal and informal.

(19) Government authorities at all levels, along with the non-governmental sector, should take measures that promote the independence and autonomy of older persons. When residential care is necessary, choice should be available to older people as the consumers of flexible services, quality care and rehabilitation.

(20) Governments and the non-governmental sector should provide support for informal care givers, including the provision of day care and respite care for older persons in need. They should also provide information, counselling and social security to carers.

(21) Governments should establish, where appropriate, legislative frameworks for the creation and activities of non-governmental organizations and other institutions of civil society, particularly in countries with economies in transition.

DATA AND RESEARCH

Current and future trends in population ageing, diversity of older persons themselves, their living circumstances, and their contributions to society and the family are still not well understood and documented, particularly in countries with economies in transition. The data and knowledge for appropriate policy development, implementation and monitoring are still limited in many countries of the region. The interface between policy makers and researchers remains limited or is altogether absent in some countries.

Recommendations

(22) Governments and the research community are encouraged to promote policy-relevant information collection and research in order to advance knowledge on all critical aspects of ageing, such as labour force participation patterns, working arrangements, transition to retirement, living arrangements, income security, health status and need for long-term care. Such data should be disaggregated by many characteristics of older persons, such as age, sex, ethnicity, and urban-rural residence.

(23) Governments and the research community should particularly encourage multigenerational and cross-national studies based on micro-level, longitudinal data capable of capturing transitions from work to retirement, functional ability to disability, independence to dependence, financial self-sufficiency to poverty, and so on.

(24) Intergovernmental organizations, Governments and non-governmental organizations are encouraged to promote regional cooperation in policy-relevant data collection and research in the above-mentioned priority areas. They are also urged to provide transition economies with various forms of assistance to respond to their specific needs.